

Stephen M. Grice, CFP®



Dixon Wells
2820 Selwyn Ave., Ste. 450
Charlotte, NC 28209
Email: sgrice@dixonwells.com
Direct: 704-364-8080
Office: 888-370-8376
Fax: 704-364-6610



PROFESSIONAL PROFILE

Celebrating his 27th year in the financial services industry, Steve welcomes the opportunity to help advisors grow their business. Steve started as a field underwriter for MONY Financial Services and quickly progressed to the management ranks. He began life brokerage sales with Transamerica in 1988 and has expanded that role to include multiple carriers and TFA Broker Dealer support with the creation of Grice Financial Group in 1998. Steve specializes in Estate Preservation and Business Planning.

EDUCATION

- East Carolina University, Greenville, NC
B.S. Business Administration

Steve earned his CFP® in 1995. He is currently registered with Transamerica Financial Advisors as a Principal and Investment Advisor. He is a member and past president of the Financial Planning Association (FPA) – Carolinas Chapter, Society of Financial Services Professionals (SFSP), and the National Association of Life Insurance Brokerage Agencies (NALIBA).